

National Estuary Program

**Puget Sound
Marine and Nearshore
Grant Program**

*Motivating Landowners to Protect and
Restore Puget Sound Nearshore
Habitat and Ecosystem Function*

**REQUEST FOR
PROPOSALS:**

***Social Marketing
Strategy to Reduce
Puget Sound Shoreline
Armoring***

May 23, 2013

RFP No. 13-0020



Social Marketing Strategy to Reduce Puget Sound Shoreline Armoring

REQUEST FOR PROPOSALS (RFP 13-0020)

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IMPORTANT DATES

May 23, 2013	Request for Proposals published
May 28 – June 7	RFP Questions accepted
June 21, 2013 12:00 PM (Noon)	Proposal submission deadline
June 21 – 28, 2013	Proposal evaluation period
July 2, 2013 approx.	Apparent successful contractor selected
July – August 2013 approx.	Contract negotiated and awarded
August 2013 – February 2014 approx.	Project implementation

PROPOSAL DUE DATE: June 21, 2013 12:00 PM Noon *Pacific Standard Time, Olympia, WA USA*

It is anticipated that up to \$250,000 will be available for this project, depending on the project scope.

Washington Departments of Fish and Wildlife and Natural Resources reserve the right to amend this solicitation for administrative or technical purposes, or to make no award or award less than the anticipated amount.

Please check the Puget Sound Marine and Nearshore Grant Program's website for more information about our program: http://wdfw.wa.gov/grants/ps_marine_nearshore/rfp/.

Purpose

The Puget Sound Marine and Nearshore Grant Program (Grant Program) is requesting proposals from qualified contractors to develop a **social marketing and behavior change strategy** that will:

- Evaluate the barriers and motivators for private shoreline landowners in choosing to remove or forgo bulkheads, rip rap, and other modifications (hereafter “armoring”)
- Identify the most effective ways to motivate the different segments of the population along Puget Sound shorelines to voluntarily choose alternatives to armoring, including incentives, messages and outreach, technical assistance, and other strategies
- Building on the lessons and successes of past efforts, provide clear, innovative, and realistic approaches for entities in the Puget Sound region to implement social marketing and behavior change campaigns that will achieve a reduction in shoreline armoring

This project is part of a multi-pronged effort to ultimately reduce the amount of armoring along Puget Sound marine shorelines, particularly in areas of critical habitat and ecosystem processes. In the future, the Grant Program will provide this social marketing and behavior change strategy, as well as information about incentive options, to local governments and other entities interested in implementing armoring reduction programs. The programs will be informed by these resources and will work with segments of the Puget Sound shoreline landowner population to motivate them to choose alternatives to armoring.

Background

Shoreline modifications interfere with ecological processes that create and maintain shoreline habitat. Reducing the amount of armored shoreline is critical to Puget Sound recovery, and it is one of the 2020 ecosystem recovery targets in the Action Agenda for Puget Sound. In many cases, alternatives to shoreline armoring are available that reduce impacts on beach habitat and offer protection of shoreline property, where needed. Social marketing and behavior change strategies that achieve voluntary stewardship among shoreline landowners can be used to complement regulatory, education, restoration, and other efforts that seek to protect Puget Sound beaches.

Private landowners along the marine shorelines of Puget Sound have different perspectives on and levels of understanding of the impacts that armoring can have on beaches. They may perceive risk from erosion as a significant threat and may not be aware of alternatives to armoring that can protect their property and reduce impacts to habitat and ecosystem processes. Where alternatives to armoring can be used along the shoreline, our goal is to identify ways to motivate private landowners to voluntarily choose to:

- Remove existing armoring where it is not necessary to protect a residence,
- Forgo armoring where there is none currently or use landward setbacks of structures, or
- Where shoreline stabilization may be necessary, use softer alternatives to armoring.

The selected contractor will conduct and compile audience research, and build on lessons and successes of past efforts, to identify the approaches, messages, incentives, technical assistance, and other strategies that will be effective in motivating private shoreline landowners to choose alternatives to armoring. We will provide this social marketing and behavior change strategy to local governments, tribes, and other entities so that they can apply efforts that ultimately achieve a reduction in shoreline armoring along Puget Sound.

The Grant Program is co-led by the Washington Department of Fish and Wildlife and the Washington State Department of Natural Resources. We are funded by the U.S. Environmental Protection Agency through the

National Estuary Program. Our investments advance the Action Agenda for Puget Sound by protecting and restoring marine and nearshore habitat and ecosystem processes.

Eligible Applicants

Any organization or entity that has the capacity and experience necessary to carry out the tasks outlined in this RFP is eligible to apply. This includes state agencies, local and tribal governments, non-profit organizations, institutes of higher education, graduate researchers, and private businesses or contractors.

Project Period

Project awards will target work to be completed between approximately August 2013 and February 2014.

PROJECT SCOPE

This project will identify the barriers and motivators for landowners along marine shorelines of Puget Sound in choosing alternatives to shoreline armoring, so that the right combination of technical assistance, education, incentives, and other strategies can be used to achieve a reduction in armoring. It will describe how to motivate segments of the marine shoreline landowner population to voluntarily remove existing armoring or to forgo armoring where the shoreline is currently undeveloped. It will use existing information, as well as gather new data from target audiences, about actual barriers and motivators to choosing alternatives to armoring. Building on past lessons and successes of similar efforts, it will recommend education, incentives, messages, and other strategies that will be effective in influencing target audiences to actually remove or forgo armoring. It will provide clear, innovative, and realistic approaches for entities in the Puget Sound region to implement social marketing and behavior change campaigns.

Project Description

This project will include seven tasks and associated deliverables. The following is a summary of, at minimum, what should be achieved in each task. Proposals can also include ideas for additional task elements that could be included that would improve the success of the project, or creative approaches to achieve the Grant Program's desired outcomes.

Task 1 – Project management

The project will include the following milestones and associated deliverables related to project management and implementation.

- 1.1 Project kick-off meeting with Grant Program staff and subject-matter experts to align expectations and discuss project implementation.

Deliverable: Kick-off meeting summary

Target completion date: September 2013

- 1.2 Outline of the approach and methods that will be used to gather information from target audiences, to be agreed upon before implementation.

Deliverable: Draft report on survey approach and methods

Target completion date: October 2013

- 1.3 Coordination meeting with Grant Program staff and subject-matter experts to discuss the intersection of this project with other elements of the multi-pronged effort to reduce shoreline armoring.

Deliverable: Coordination meeting summary

Target completion date: February 2014

Task 2 – Identify target audiences for social marketing and behavior change strategies

Analyze the population of residential landowners (does not include public lands or those in non-residential commercial use) along the marine shorelines of Puget Sound and Strait of Juan de Fuca (all US waters south of the Canadian border and east of Cape Flattery). Identify distinct segments of this population that could be effectively targeted with social marketing and behavior change strategies. At a minimum, residential landowners should be separated into those who currently have shoreline armoring and those without.

Use existing available demographic information, and potentially gather additional data in order to accomplish this task. Identify audiences that could most effectively be targeted with social marketing and behavior change strategies that motivate them to choose alternatives to armoring.

Deliverable: Report on segmentation of marine shoreline landowners along Puget Sound. Includes compilation of the data used. Indicates, at a minimum, size and geographic distribution of the target audiences, their characteristics and attitudes, and other detailed information needed to identify each distinct audience group. Report includes recommendations on audiences that will be most effective to target with social marketing and behavior change strategies.

Target completion date: December 2013

Task 3 - Identify behaviors to target

Evaluate the factors - choices, behaviors, influences, and environmental conditions - that lead to armoring along Puget Sound for the selected target audiences. The successful contractor will be provided with a summary of identified factors by the Grant Program as a starting point. Map out the specific behaviors and choices of the target audiences, and identify points where choices are made and one could most effectively influence a landowner to achieve our desired outcomes. Identify behaviors where significant change could be achieved, compared to current behaviors, using targeted social marketing and incentives. Focus on behaviors that, as directly as possible, lead to armoring being removed or avoided.

Deliverable: Report on factors that lead target audiences to choose armoring or an alternative, and recommendations on behaviors and decision points that will likely be most effective to target.

Target completion date: December 2013

Task 4 – Evaluate barriers and motivators for target audiences

Compile existing data and literature on barriers and motivators to choosing alternatives to armoring for target audiences, as well as influences competing with our desired outcomes. A selection of resources including this information will be provided to the successful contractor by the Grant Program. Identify critical data gaps that need to be filled in order to understand the barriers and motivators for the target audiences specifically related to the target behaviors chosen in Task 2. Gather primary data from target audiences, if needed, to identify effective social marketing and behavior change strategies.

Deliverable: Report for each target audience on barriers and motivators to choosing armoring or preferred alternatives, and how that relates to target behaviors. Make recommendations on barriers that should be addressed, how to remove the barriers, and motivators that should be emphasized to achieve desired outcomes.

Target completion date: December 2013

Task 5 – Develop strategy and creative solutions

Building on Tasks 1 through 3, as well as lessons and successes of similar past efforts, create social marketing and behavior change strategies for each target audience and for specific behaviors. For each

strategy, identify messages and education, incentives (monetary and non-monetary), resources, technical assistance, and other techniques that will decrease barriers and increase motivation of landowners to actually choose alternatives to armoring. Include a variety of products and strategies that could be effective. Indicate whether one or more target audiences are most ready to achieve our desired outcomes. Provide clear, innovative, and realistic approaches that entities - from nonprofit organizations to local governments – could actually implement to achieve desired outcomes for Puget Sound.

This task should include initial testing of recommended messages and approaches, using focus groups or other means, in order to increase the likelihood of success of these strategies. Also, identify additional testing that could be done by entities implementing the strategies to improve the likelihood of success.

Deliverable: Report on strategies for each target audience, including detailed outlines of messages, incentives, resources, and other techniques that will likely be effective. Also describe initial testing of recommended strategies that was conducted and how that influenced the final recommendations on strategies.

Target completion date: January 2014

Task 6 – Performance evaluation plan

Provide details on how entities implementing these social marketing and behavior change strategies could evaluate progress and measure the outcomes of their efforts. Identify information it would be useful to collect before, during, and after implementation of these strategies. Anticipate adjustments that could be made during implementation based on data on performance.

Deliverable: Report on performance evaluation plan.

Target completion date: January 2014

Task 7 – Final report

Compile the information gathered and developed from Tasks 1 through 6 into a clear report that provides guidance to entities interested in implementing these strategies. Present the findings of this project at a minimum of one meeting of interested parties (in addition to meetings identified in Task 1).

Deliverable: Final social marketing and behavior change strategy report.

Target completion date: February 2014

FUNDING INFORMATION

Anticipated Funding Level

It is anticipated that up to \$250,000 will be available for this project, depending on the project scope.

The Grant Program reserves the right to negotiate final project elements with the successful contractor. Final award amount and scope may differ from what is proposed based on the needs of the Grant Program. The Grant Program reserves the right to reject all proposals and make no award under this RFP, or award less than the full amount of funds available.

Source of Funding

Awards are administered through contracts with the Washington Department of Fish and Wildlife. WDFW is providing this award under a cooperative agreement with the U.S. Environmental Protection Agency, Region 10. ***All awards are subject to both state and federal terms and conditions.***

Method of Reimbursement

The contract for this project will be deliverables-based, meaning the successful contractor will be reimbursed the fixed price for completing the specific deliverables identified in the contract. *Once the project sponsor has completed and provided a deliverable—and the Grant Program has accepted it—the Grant Program will reimburse the contractor for the pre-stated cost of that deliverable.*

PROPOSAL SUBMITTAL

Each complete proposal will include three documents: Technical Proposal, Management Proposal, and Cost Proposal.

1. Technical Proposal

Technical Proposal shall be no more than eight pages, including the cover page and proposed statement of work.

A. COVER PAGE (SEE PAGE 11 FOR TEMPLATE)

- Project Title
- Contact information (*Contractor name, secondary contact, affiliations, mailing addresses, telephone numbers, e-mail addresses*)
- Budget
- Authorized Signature

B. STATEMENT OF WORK

The Proposed Statement of Work (SOW) should completely describe the proposed project so that there is a clear understanding of what will be accomplished via the contract. The SOW contents should describe, in full, the project design, and may provide any pertinent supporting documentation. It must also identify potential risks that are considered significant to the success of the project. Include how risks would be effectively monitored and managed, including reporting on risks to the Grant Program.

I. SCOPE

Provide a brief statement of what will be accomplished by the project - the breadth and limitations.

II. OBJECTIVES

Provide a concise overview of the contract effort, goals, and objectives.

III. TASKS AND DELIVERABLES

Expand on the description of the tasks listed under Project Description. Describe specifically how the tasks will be completed. Under each task, list the deliverable(s), the associated reimbursable cost(s), and due date(s).

IV. PERIOD OF PERFORMANCE

Contract work must be complete by February 28, 2014.

2. Management Proposal

A. STATEMENT OF QUALIFICATIONS

- Provide organizational experience relating to the proposed activities and objectives.
- Provide a description of the proposed project team structure, including any subcontractors. Indicate lines of authority for personnel involved in performance of this potential contract, as well as lines of authority to the next senior level of management. Describe who would have prime responsibility and final authority for the work.
- Include resumes for project managers and key staff, and indicate the amount of time each will be assigned to the project. The Contractor must commit that staff identified in the proposal will actually perform the assigned work. Any staff substitution must have the prior approval of the Grant Program.
- Describe how the expertise, qualifications, and knowledge of key project staff (*including any sub-contracted resources*) will enable them to successfully complete the tasks.
- Submit a list of no more than three projects similar in size, scope, and relevance to the proposed project that your organization has performed, and describe how they demonstrate success in achieving goals and objectives similar to this project. Include whether and how you were able to successfully complete and manage these agreements within the original budget and schedule, and how success was measured.

3. Cost Proposal

A. BUDGET WORKSHEET

Provide in an Excel Worksheet the **total cost** for each deliverable, and the cost breakdown for the objects such as salaries, travel, etc., in the following format. Costs of work performed by any sub-contractors/partners to the project sponsor must be indicated in “contractual.”

BUDGET FORMAT:

	Task 1	Task 2	Task 3	Task 4	Task 5	Task 6	Task 7	Total
Deliverable description	Project Management	Target Audiences Report	Behaviors Report	Barriers and Motivators Report	Social Marketing Strategy Report	Evaluation Plan Report	Final Report	
Delivery date								
Personnel								
Fringe benefits								
Travel								
Equipment (items over \$5,000)								
Supplies								
Contractual								
Other								
Indirect or overhead								
Total								

B. BUDGET NARRATIVE

To evaluate project costs, we require disclosure of whole project cost estimates. A complete budget narrative is necessary to evaluate project costs. The budget narrative should, at minimum, justify task costs.

Definitions:

- ‘Personnel’ refers to wages and salaries for staff engaged in contract work. Narrative should break down costs by staff type, by rates, and hours. Identify project roles for project managers and key staff.
- ‘Fringe Benefits’ are those costs employers incur for providing a package of benefits beyond salary or wages, and can be described as a percentage of wage costs.
- ‘Travel’ should include the method used to calculate travel costs (mileage rate; estimated miles traveled). Costs must not exceed the [Washington State per diem rates](#).
- ‘Equipment’ includes items with a value greater than \$5000 per unit and a useful life more than 1 year. Items with a unit cost of less than \$5000 are deemed to be supplies, pursuant to 40 CFR 31.3 and 30.2. If applicable, provide an itemized list of equipment and indicate why it is more economical to purchase rather than lease.
- ‘Supplies’ are material costs that are not equipment. Please describe quantities and unit costs of supplies.
- ‘Contractual’ costs may not be finalized at the time of application. Individual contracts should be itemized with a brief description of scope, recipient’s qualifications, the basis for the estimate (engineers estimate, firm fixed bid, etc.) and the status of the contract (bid documents prepared, RFP released, etc.).
- ‘Other’ costs should be described by the nature of the expense and the method of estimation.

Ineligible Expenses or Activities:

The following costs are not eligible for funding.

- **RFP Submittal costs**
- **Management Fees** or similar charges in excess of the direct costs and indirect costs. Expenses added to the direct costs in order to accumulate and reserve funds for ongoing business expenses, unforeseen liabilities, or for similar costs not allowable under this agreement.
- **Mitigation Requirements** or obligatory compensation incurred by the sponsor or a third-party. Funding may be provided for actions associated with compensation or mitigation, if those elements are above and beyond the mitigation requirements and can be easily isolated from the required mitigation activities.
- **Lobbying or litigation** against Federal, State or local Governments
- **Ordinary operating expenses** of local government, such as the salaries and expenses of a mayor, city council member, city attorney, etc., overtime differential paid to employees of local government, and permits and fees required by federal, state, or local regulations.
- **Bad debts, uncollected accounts** or claims
- **Alcoholic beverages**
- **Interest and other financial costs**
- **Raffle, door, or other prizes** unless authorized by the Grant Program

Submittal

All proposals must be sent electronically to Phillip.Thompson@DFW.WA.Gov no later than **12 P.M. (noon), Pacific Time on June 21, 2013**. Proposals received after this time will be rejected without review. WDFW will not review or inform project sponsors of the completeness of applications prior to the RFP close date. Responses deemed incomplete or otherwise ineligible will not be reviewed and evaluated.

PROPOSAL REVIEW PROCESS

An advisory review panel made up of individuals with subject-matter expertise will review, evaluate, and rank proposals. The Grant Program will then select the apparent successful contractor.

Evaluation Criteria

Eligible proposals will be evaluated on the criteria listed below. Points will be awarded based on how well each evaluation criterion is addressed.

A. Technical Proposal (50 points)

- Project Approach & Methodology - Includes a complete description of the Contractor's proposed approach and methodology for the project. Approach conveys the Contractor's understanding of the project and is responsive to the RFP. Proposed approach will likely achieve the desired outcomes.
- Work Plan - Includes all project requirements and tasks necessary to accomplish the scope of the project defined in this RFP. Contains sufficient detail to convey the Contractor's knowledge of the subjects and skills necessary to successfully complete the project. May also present creative approaches that might be appropriate.
- Project Schedule - Includes a project schedule indicating when the elements of the work will be completed within the timeframe targeted in the RFP.
- Risks - Potential risks that are significant to the success of the project are identified, and the proposal includes how to effectively monitor and manage these risks.

B. Management Proposal (30 points)

- Staff Qualifications/Organizational Experience - Identifies staff, including subcontractors, who will be assigned to the potential contract, and their proposed responsibilities. Provides resumes for the named staff that demonstrate relevant expertise and qualifications related to this project. Demonstrates past success of the staff/organization in implementing similar projects and activities.
- Project Team Structure/Internal Controls - Describes the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors, and indicates who will have prime responsibility and final authority for the project.

C. Cost Proposal (20 points)

- Budget does not exceed the anticipated contract amount.
- Budget is complete and accurate.
- Budget provides good return on investment.

Debriefings

Sponsors of unsuccessful proposals may request a debriefing. Discussion at the debriefing conference will be limited to the following:

- Evaluation and scoring of the sponsor's proposal.
- Critique of the proposal based on the evaluation.
- Review of sponsor's final score in comparison with other final scores without identifying the other firms.

Comparisons between proposals or evaluations of the other proposals will not be allowed.

COVER SHEET TEMPLATE

Project Title:		
	Primary Contact	Secondary Contact
Contact Name:		
Affiliation:		
Address:		
Office Phone:		
Cell Phone:		
e-mail:		
Grant request:	\$	

Certification of Information

- ☐ The applicant, by the signature below, certifies that he or she has read and understands the RFP and that all of the information contained in this application and supporting materials is accurate as of the signature date. The applicant certifies that its organization/governing board supports the project as described in this application. The applicant understands that Puget Sound Marine and Nearshore Grant Program staff may independently verify all information provided, and that the discovery of incomplete, inaccurate, or misleading information are grounds for the disqualification of this grant application or the revoking of an award.

(SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL)

DATE

TYPED NAME AND TITLE